



Request for Proposals (RFP)

November 1, 2022

1. Objective of RFP:

Obtain consulting services to analyze past and current revenue streams and identify new sources of attainable revenue for the repositioning of COA; this, resulting in a dynamic business plan that will increase revenue and rebuild COA's capacity, post-COVID, to fund programs that will meet the needs of Ottawa's older adult community.

2. Contracting Authority:

Sarah Bercier on behalf of Council of Aging of Ottawa
217 – 815 St. Laurent Blvd. Ottawa, Ontario K1K 3A7 (613) 789-3577 coa@coaottawa.ca

3. Enquiries & Submissions to:

Sarah Bercier s.bercier@coaottawa.ca 613-277-4656
Replies to clarification enquiries may be shared with other bidders to the RFP without revealing any sources of enquiries.

4. RFP closing:

November 16, 2022, 5pm.
Number of copies to be submitted: 1
Bidders signature (electronic and/or manuscript) indicates acceptance of terms and conditions herein.
Interviews will be held the week of November 20-24

5. Period of Work:

December 1, 2022 to January 27, 2023 (58 calendar days)

6. Statement of Work:

- a. Provide analysis of current revenue streams
- b. Create business plan to achieve desired goals

- c. Give a presentation to the Board (January 27)

Provide consulting services to analyze past and current revenue streams and identify new sources of attainable revenue for the repositioning of COA; this, resulting in a dynamic business plan that will increase revenue and rebuild COA's capacity, post-COVID, to fund programs that will meet the needs of Ottawa's older adult community.

Recommend a budget to support this work, not to exceed \$8,000.

Work to be included in the final product:

- examination and evaluation of COA's current revenue and business models
- a business plan that proposes realistic and attainable revenue goals
- identification of effective fundraising, fee structure, and service delivery strategies
- recommendations for current and alternative revenue streams through: educational events, fundraising, membership, planned giving, donations, grants, and other funding sources such as United Way, other charitable foundations and philanthropic organizations
- strategic engagement strategy with donors and other stakeholders
- proposed staffing or consulting services to lead these initiatives
- established timelines to achieve medium to long-term plans to ensure renewed revenue generation and financial sustainability as we prepare for the 'new normal'.

7. Terms and Conditions:

Proposed all-inclusive per diem (HST excluded) (or firm lot price for total, HST excluded) for established days' work per professional. (not to exceed in aggregate \$8000)

No increase in price of work by the contractor will be authorized unless these have been approved in writing by the Contracting Authority.

Up-to-date CV's required for all proposed contract personnel.

Contracting Authority reserves the right to issue contract to best value bidder, including but not limited to lowest response bidder.

All ideas and program suggestions will not be proprietary to any responder to this RFP.

8. References:

Bidders are required to submit 2 references. Contracting authority reserves the right to contact bidder's previous clients.

9. Payment:

Invoices are required prior to any payment.

Installment Payments will be available on the following schedule:

25% at start of contract (week of December 1)

25% at mid-point (week of January 2)

Final 50% upon acceptance by Contracting Authority of final product (week of January 26)

10. RFP Bid evaluation:

Bids in response to this RFP will be evaluated based on how well the bidder's proposed work matches/meets all required information and assessment criteria for Ontario Trillium

Foundation, Resilient Community Fund. See application criteria and Financial Workbook.

<https://otf.ca/resources/resilient-communities-fund-resources/resilient-communities-fund-application-questions>

<https://otf.ca/our-grants/resilient-communities-fund>

- Proven experience in similar projects
- Meeting contract price
- References
- Proposed work matching/meeting all outlined requirements
- Evidence of a clear understanding of COA's needs
- Demonstration of new and innovative approaches to achieve sustainable revenue

11. Other terms & conditions:

- After RFP closing date, Contracting Authority may require clarification interviews with bidders.
- Contracting Authority reserves the right to:
 - reject any or all proposals received in response to this RFP;
 - enter into negotiations with bidders on any or all aspects of their proposal;
 - accept any proposal in whole or in part without prior negotiation;
 - cancel and/or re-issue this RFP at any time;
 - award one or more contracts;
 - retain all proposals submitted in response to this RFP.

12. RFP Background:

The COA has traditionally relied heavily on in-person events to attract members and donations and to provide opportunities for connection with and between older adults. Historical fundraising streams, including signature fundraising events, educational forums and workshops, membership renewals and donor relations, have largely been driven by in-person attendance. COVID has had a significant impact on these events and many older adults are hesitant to resume participation in large group settings going forward.

- Our Spring Luncheon and President’s Breakfast are long-standing signature events providing 50% of our total fundraising budget annually. Revenue from these events has reduced by over 60% due to COVID.
- While our educational events have transitioned online, many older adults have not been comfortable with online technology or participation resulting in a 50% reduction in attendance and related revenue.
- In addition, the current trend toward free online events impacts our ability to charge sufficiently to cover the cost of materials.
- Staff currently lack the training and equipment to be able to deliver hybrid sessions in a professional manner which is in demand moving forward.
- The lack of in-person events has had a negative impact on membership renewals. Corporate membership is down 35% with advertising and sponsorship opportunities at events having been non-existent; individual memberships are down 17% as older adults see less value in a membership that provides only online events.
- While donations continued throughout COVID, current trends are seeing post-COVID decreases.
- In total our lost revenue is approximately \$ 45,000-50,000 annually.
- Over the next 12 months, the COA must adapt its revenue streams and program delivery to adjust for the ongoing COVID environment in order to allow for continued support of older adults’ underrepresented voices.

13. A Few Additional Details

The Council on Aging of Ottawa is a bilingual, volunteer-based charitable organization dedicated to improving the quality of life of seniors living in Ottawa. We strive to promote and champion the basic tenets of an inclusive, caring city and the importance of community-wide engagement with a special focus on the vulnerable and isolated.

The following are some of the detailed statistics that we are working with presently.

Membership



- **Membership Numbers**

	2019	2020	2021	current
Total	511	460	451	395
Individual	431	391	381	334
Organizational	13	17	14	10
Corporate	46	32	35	30
Honorary	21	20	21	21

- **Member Benefits** (Individual, Organizational, Corporate)
See <https://coaottawa.ca/memberships/>

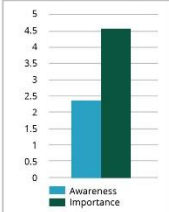
- **Survey Results** from July 2020

2020 Survey Results


Thank you to the 589 people who responded to our recent survey. What a terrific response! Your responses will be extremely helpful to us in understanding what you consider to be important and useful work for the Council on Aging of Ottawa.

Here is what respondents told us through the survey:




There was a **notable gap** between respondents' low level of awareness of the COA's advocacy, publications, and education initiatives and the high level of importance they allocated to these same initiatives.


The most valued **areas of advocacy** were:



Long-Term Care




Social Isolation




Housing


The most valued **publications** were:



Magazine (The Bulletin)



Housing Guide



Older Driver Information

42% have attended the COA's **education** events in the past year

75% plan to attend in the coming year

56% reported that they would attend events in person as soon as **public health says it is okay to do so**

39% said that they will only attend events in person **when there is a vaccine**

84% would like to have **the choice of** attending events **online or in person** as an ongoing option in the future

10% **do not have** the technology to attend events online

The most motivating factors in being a member are:

♥ Supporting **advocacy and government relations** efforts

♥ Supporting the development of **quality education** for seniors

♥ Addressing issues that affect **seniors in the Ottawa community**

♥ Supporting the dissemination of **useful information** through the Info-Flash, website, and social media such as Facebook

96% of **current COA members** plan to renew their membership

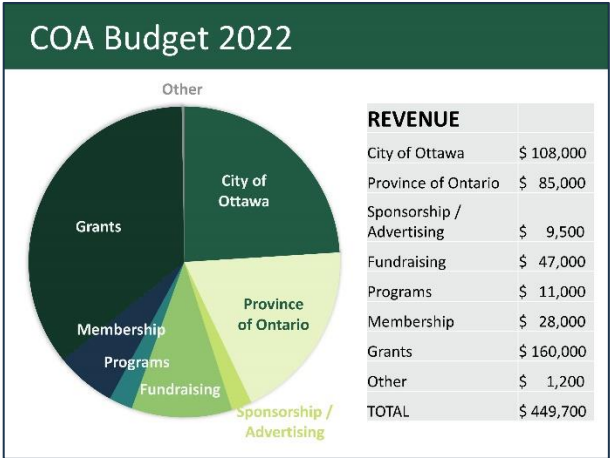
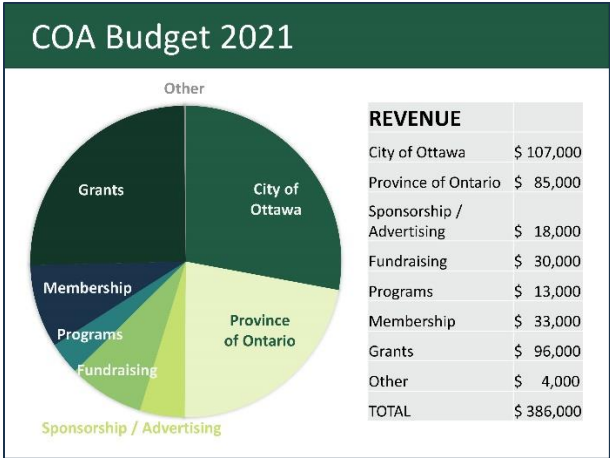
47% of **non-members** plan to join in the coming year

91% of **current members** plan to recommend membership to a friend

55% of **non-members** plan to recommend membership to a friend

Some Key Current Fundraising Revenue Streams

- Grand Parade (Gross \$22,000 – Net \$16,500)
- Give 65 – Donor Matching (\$11,000)
- Give 65 – Donor Matching (Planned for November)



Revenue Sources that we do not currently benefit from

- planned giving
- other funding sources such as charitable foundations and philanthropic organizations

Note: Other information may be available on COA’s website